



Tempo 25.1 Release Notes

Version 1

Release Date: January 25, 2025



SAGENT



Tempo Release Notes

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Release Summary

The following areas are impacted with this release.

| Product | Description of Product |
|------------------|---|
| Core | Any functionality that is common to all modules, display at loan level, administration, and reporting |
| Order Management | Fulfilment module (title, doc gen) |

Please submit any questions or findings to Sagent at <https://sagentsupport.service-now.com/csm>.

Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Core

Features

| | |
|------------------------|---|
| Feature 496847 | Optimize Bulk Comtag Template Processing - Phase 2 |
| Description | This feature enhances the Bulk Comtag Update Template ; users can now add up to 5000 rows of data instead of 1000. |
| Testing Considerations | <p>Negative Testing:</p> <ol style="list-style-type: none">1. Populate the template with 5001 or more records.2. Populate the template with missing required data points or Field Input Values that do not appear on the Read Me tab.3. Upload and Submit the template into the Bulk Comtag Update section.4. Review the Loan Updates Results section for the results. <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log-in as an Employee/Service User.2. Go to the Data Management Shortcut and then select Loan Updates. |



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| | <ol style="list-style-type: none">3. Download the Bulk Comtag Update template.4. Populate the template with the required data points, as shown on the Read Me tab.5. Populate the template with 5000 records.6. Upload and Submit the template into the Bulk Comtag Update section.7. Review the Loan Updates Results section for the results. |
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| Feature 515251 | UI Enhancements for 25.1 |
| Description | <p>This feature introduces several enhancements to the Tempo UI to improve the user experience.</p> <ul style="list-style-type: none">• In the Default Management>Referral Overview> Comtag screen:<ul style="list-style-type: none">○ , All A B C , etc have been removed from the top of the screen on the Active and Archived Tabs.○ A new Quick Search box and a Clear button are added above the columns.○ Users can search ALL the data fields within the Comtags screens by entering 3 consecutive characters and clicking on the search icon.○ Users can click the Clear button to remove the entries from the Search text box.• In the ECMS>Loan Documents screen, removed the white space to have the document rows closer together.• Updated the buttons on the Queue Creator>Work Group Creator tab. |
| Testing Considerations | <p>Comtags</p> <p>Negative Testing:</p> <p>Use the search bar to search on a character that is not in the Comtag Description (Active and Archived).</p> <p>Positive Testing:</p> <ol style="list-style-type: none">1. Navigate to a referral with more than one active Comtag.2. Use the search bar to find at least one character match on the Comtag Description field and click enter or the search icon. |



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| | <ol style="list-style-type: none">3. The grid will display the match on the Comtag Description field.4. Repeat this process for the Archived Comtag tab. <p>ECMS View Multiple Documents</p> <p>Negative Testing:</p> <p>Ensure you can interact with all buttons on the screen without issue.</p> <p>Positive Testing:</p> <ol style="list-style-type: none">1. Locate a loan with 5-10+ documents.2. Navigate to an ECMS Doc Management and click View Multiple Documents with multiple documents.3. The results should have less space between rows to see more documents without scrolling. <p>Padding for Work Group Button</p> <p>Negative Testing:</p> <ol style="list-style-type: none">1. Ensure the Create New Work Group button loads the screen.2. Confirm FIPS County Code Template downloads the Excel to your desktop destination. <p>Positive Testing:</p> <ol style="list-style-type: none">1. Navigate to Queue Creator and click the Work Group Creator tab.2. The results should see the Create New Work Group and FIPS County Code buttons no longer truncated. |
|--|---|

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| Feature 481375 | Retain Page Position When Searching a New Loan |
| Description | This enhancement improves efficiency by giving users the ability to remain on the same page when selecting a loan from the Last 10 Loans Viewed or when searching for a new loan. For example, if the user is on the Bankruptcy Proof of Claim screen and searches for a loan, the system will remain on the screen and |



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display the information for the searched loan. If the new loan is not found, the system will navigate to the Loan Info page.

This feature is applicable for all the common screens (referral Types)

- Default Loan Info
- Events
- Tasks
- Holds
- Comtags
- Document Tracking
- Form/ Package Generator
- Comments

It also applies for the following specialty screens (applicable under each specified referral type):

Foreclosure

- Financial Figures
- CWCOT

Bankruptcy

- Proof Of Claim
- Pre-Petition Plan
- Motion for Relief
- Agreed Order Plan
- Financial Figures

Early Intervention

- Hardship Discovery
- Borrower Financial Discovery
- Servicer Verification
- Strategy Analysis
- Strategy Set Up
- Financial Figures

Loss Mitigation

- Loss Mit Strategy Tracking
- Short Sale Offer Tracking
- Financial Figures

Real Estate Owned



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| | <ul style="list-style-type: none">• REO Tracking• Financial Figures Litigation <ul style="list-style-type: none">• Final Terms• Financial Figures Claims <ul style="list-style-type: none">• Claims Information• Default Cash Posting• Loss Analysis• Financial Figures Property Preservation Financial Figures |
| Testing Considerations | <p>Testing Scenarios</p> <ol style="list-style-type: none">1. Page Retention:<ul style="list-style-type: none">• Verify that the current page is retained when a user searches for a new loan.• Ensure the current page is retained when a user selects a loan from the "Last 10 loans Viewed" drop-down.• Confirm that if there are multiple tabs on a specific screen, the user is taken to the same screen but not a specific tab.• Check that if the page does not exist on the new loan, it defaults to the Loan Info Page.2. Common Screens:<ul style="list-style-type: none">• Test the feature on the following common screens to ensure it applies correctly:<ul style="list-style-type: none">▪ Default Loan Info▪ Events▪ Tasks▪ Holds▪ Comtags▪ Document Tracking |



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| | <ul style="list-style-type: none">▪ Form/Package Generator▪ Comments <p>3. Specialty Screens:</p> <ul style="list-style-type: none">• Verify the feature on the following specialty screens under each specified referral type:<ul style="list-style-type: none">▪ Loss Mitigation Platform:<ul style="list-style-type: none">▪ Intake Questions▪ Pre-Underwriting▪ Financial Review▪ Evaluation and Decision▪ Payment Plan Tracking▪ Escrow and Capitalization▪ Foreclosure▪ Financial Figures▪ CWCOT:<ul style="list-style-type: none">▪ Bankruptcy▪ Proof Of Claim▪ Pre-Petition Plan▪ Motion for Relief▪ Agreed Order Plan▪ Financial Figures▪ Early Intervention:<ul style="list-style-type: none">▪ Hardship Discovery▪ Borrower Financial Discovery▪ Servicer Verification▪ Strategy Analysis▪ Strategy Set Up▪ Financial Figures▪ Loss Mitigation:<ul style="list-style-type: none">▪ Loss Mit Strategy Tracking |
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- Short Sale Offer Tracking
- Financial Figures
- Real Estate Owned:
 - REO Tracking
 - Financial Figures
- Litigation:
 - Final Terms
 - Financial Figures
- Claims:
 - Claims Information
 - Default Cash Posting
 - Loss Analysis
 - Financial Figures
- Property Preservation:
 - Financial Figures

4. Edge Cases:

- Test scenarios where the user navigates to a page that does not exist on the new loan to ensure it defaults correctly to the Loan Info Page.
- Verify the behavior when switching between different referral types and screens.

5. User Experience:

- Ensure the transitions between screens are smooth and intuitive.
- Confirm that the user interface elements are consistent and functional across all screens.



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| Feature 429172 | Restrict Attorney Firms from Retiring Comtags and Tasks |
| Description | <p>This feature provides functionality to prevent Attorney users from retiring Tasks and Comtags.</p> <p>Note: This is applicable for any Role configured with the Attorney User profile.</p> <p>Attorney users are restricted from clicking the icons and buttons on the following screens:</p> <ul style="list-style-type: none">• Comtag Screen – Retire icon and Retire Comtags button.• Task Screen - Retire icon and Retire Task Template icon.• Comtag>View Comments>Comments pop up – Retire button. |
| Testing Considerations | <p>Negative Testing:</p> <p>Add or update a Comtag to ensure no negative impact on the existing processes/flows.</p> <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo as an Attorney User.2. Open a Comtag.3. Log in to Tempo as another Attorney User.4. Verify that the 2nd Attorney User cannot Retire the Comtag opened by the 1st Attorney User.5. Verify the 1st and/or 2nd Attorney User cannot Retire any Comtag originated by an Employee, Vendor or Investor. |

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| Feature 480511 | Improve the DDF upload timing between Document Tracking and ECMS |
| Description | <p>This feature reduces the amount of time it takes to load a document from a DDF into Doc Tracking and ECMS. The load should take only a few seconds now.</p> <p>Note: This is applicable for ALL referral types.</p> |



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| Testing Considerations | <p>Negative Testing:</p> <p>Perform a typical Tempo process to ensure no negative impact on the existing processes/flows.</p> <p>Positive Testing:</p> <ol style="list-style-type: none">1. Configure a DDF with an attachment.2. Configure a Doc Tracking template with the Document Index used within the DDF Attachment configuration (as configured above).3. Add the DDF to the DDF Mapping and to either a Task or Event Reprojection or Close configuration.4. Add a Document Tracking Template with the Document Index used within the DDF Attachment configuration.5. Reproject or Close the Event or Task that has the DDF mapped to it and attach the document.6. Verify the timing it takes to load from the DDF, to the Document Tracking Template and ECMS (Can use the Comments screen within the Referral). |
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| Feature 494030 | Comtag Open Assignment (A) should not flow into an Employee (E) Queue |
| Description | <p>This feature updates the system to ensure that Work Group Queues contain the appropriate entries based on the Owner Type. New Comtags that are assigned to Open Assignment (A) will now appear only in the Attorney Owner Type Work Group Queues. Previously, these had loaded into the Servicer Owner Type Work Group Queues.</p> <p>Attorney Comtag users can export the items from the Queue; this will reflect the items based on the Queue Filters.</p> |
| Testing Considerations | <p>Negative Testing:</p> <p>Log in as an Attorney User and verify the Comtag is displayed within the Queue Results Grid and Export to Excel option.</p> <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log-in as an Employee/Servicer User.2. Configure or Assign a Work Group that would filter/generate results for Comtags.3. Open a Comtag with a Need By Date within the next 5 days and the Assigned to of Open Assignment (A).4. Go to the Worklist Queue screen, select the Work Group from Step 2 above, ensure the Owner Type is Servicer and click on Filter.5. An Employee/Servicer user should not see the Open Assignment (A) Comtag within the Work Queue Results Grid or Export to Excel option. |



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Order Management

Features

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| Feature 131872 | Add REO Addendum as a new Appraisal Product Sub Type |
| Description | <p>This feature adds a new Order subtype called "Interior - Form REO Addendum". This sub type will be available on the drop down only when the order type field is selected as Appraisal in the Order Management> Submit Order tab.</p> <p>The new Order Subtype is added under the Bulk Order Template on the Read Me file tab.</p> |
| Testing Considerations | <p>Negative Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Order Management and select the Order Type = Appraisal.3. Attempt to select the Order Sub Type = Interior - Form REO Addendum.4. The new Order SubType isn't there because it hasn't been approved for any Vendors (see Positive Test scenarios). <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Administration>Reference Builder>Vendor Creator. Select an approved Valuation Vendor by selecting Servicer Assigned = Yes, Vendor Type = 3rd Party Vendor, Vendor Sub Type = Valuation, State = All, then select the Vendor of your choice (SingleSource, Valuation Connect, Consolidated Analytics, First Allegiance, etc) and click Submit.3. In the Region Contact Information section, under the Order Management Service Offerings, make sure "Interior-Form REO Addendum" is selected. Then click Save.4. Navigate to Order Management and select the Order Type = Appraisal.5. Select the Order Sub Type = Interior - Form REO Addendum.6. The Vendor Name list should contain all/any Vendors you added the new REO Addendum to in Vendor Creator.7. Pick a Vendor, enter a Loan Number and place an order. |



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| | 8. The new Subtype is also visible in other Admin screens including Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels. |
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| Feature 527620 | Add new Title Subtype for Foreclosure Information Report - 2 Owner |
| Description | <p>This feature adds a new Order Subtype called Foreclosure Information Report - 2 Owner. This subtype will be available in the drop down only when the order type field is selected as Title Report in the Order Management> Submit Order tab.</p> <p>Foreclosure Information Report - 2 Owner Order Subtype is added under the Bulk Order Template on the Read Me File tab.</p> |
| Testing Considerations | <p>Negative Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Order Management and select the Order Type = Title Report.3. Attempt to select the Order Sub Type = Foreclosure Information Report - 2 Owner.4. The new Order Subtype isn't there because it hasn't been approved for any Vendors (see Positive Test scenarios). <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Administration>Reference Builder>Vendor Creator. Select an approved Valuation Vendor by selecting Servicer Assigned = Yes, Vendor Type = 3rd Party Vendor, Vendor Sub Type = Title, State = All, then select the Vendor of your choice (Mortgage Connect, Title365, First American, Vylla) and click Submit.3. In the Region Contact Information section, under the Order Management Service Offerings, make sure "Foreclosure Information Report - 2 Owner" is selected. Then click Save.4. Navigate to Order Management and select the Order Type = Title Report.5. Select the Order Sub Type = Foreclosure Information Report - 2 Owner. |



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| | <ol style="list-style-type: none">6. The Vendor Name list should contain all/any Vendors you added the new FIR 2 Owner to in Vendor Creator.7. Pick a Vendor, enter a Loan Number and place an order.8. The new Subtype is also visible in other Admin screens including Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels. |
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| Feature 437092 | Add a new appraisal subtype "Interior - 2nd Chance CWCOT" Appraisal |
| Description | <p>This feature adds a new Order Subtype called Interior - 2nd Chance CWCOT 1004. This subtype will be available in the drop down only when the order type field is selected as Appraisal.</p> <p>Interior - 2nd Chance CWCOT 1004 Order Subtype is added to the Bulk Order Template on the Read Me File tab, and will also be available on the Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels.</p> |
| Testing Considerations | <p>Negative Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Order Management and select the Order Type = Appraisal.3. Attempt to select the Order Sub Type = Interior - 2nd Chance CWCOT 1004.4. The new Order Subtype isn't there because it hasn't been approved for any Vendors (see Positive Test scenarios). <p>Positive Testing:</p> <ol style="list-style-type: none">1. Log in to Tempo.2. Navigate to Administration>Reference Builder>Vendor Creator Select an approved Valuation Vendor by selecting Servicer Assigned = Yes, Vendor Type = 3rd Party Vendor, Vendor Sub Type = Valuation, State = All, then select the Vendor of your choice (SingleSource, Valuation Connect, Consolidated Analytics, First Allegiance, etc.) and click Submit. |



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3. In the **Region Contact Information** section, under the Order Management Service Offerings, make sure "Interior - 2nd Chance CWCOT 1004" is selected. Then click **Save**.
4. Navigate to Order Management and select the Order Type = **Appraisal**.
5. Select the Order SubType = **Interior - 2nd Chance CWCOT 1004**
6. The Vendor Name list should contain all/any Vendors you added the new CWCOT product to in Vendor Creator.
7. Pick a Vendor, enter a Loan Number and place an order.
8. The new Subtype is also visible in other Admin screens including Administration>Parameter Builder>Order Management Parameters: Default Transaction Rules, Order Timeline Threshold, Order Rule Assignment and Order Service Levels.



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Document History

This section details the history of the document at each version. It's good to know what has changed in each version and when it happened.

| Version | Date | Changes |
|---------|-----------|---------|
| 1 | 1/25/2025 | N/A |
| | | |



Dara Default

Release 25.1

Release Date: January 25, 2025



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Release Summary

The following area is impacted with this release.

| Product | Description |
|-------------|---|
| Dara Claims | Claims functionality within Dara and with Claims partners |

Please submit any questions or findings to Sagent at <https://sagentsupport.service-now.com/csm>.

Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Claims


| Feature 473739 | Support Document Tracking Automation for Claims |
|----------------|--|
| Description | <p>This feature benefits Claims processors by enabling administrators to create workflows using Claim Subtypes. Users will be able to configure Document Tracking Templates by setting Claim Subtype Controlling Actions and related claim subtype Controlling Action Identifiers. In addition, documents that are required for a particular template will be Identified with a red information icon; this will assist users in recognizing the documents that are needed to complete their process.</p> |
| | <p>The new Claim Subtype Controlling Action and related Controlling Action Identifiers will also be available for the Bulk Upload process. The Read Me tab on the Bulk Document Template will contain information on the Controlling Action and Controlling Action Identifier.</p> |
| | <p>Administrators</p> <p>On the Document Management Creator > Create Document Template Name screen, admins can select the new Claims Sub-type for the Controlling Action Type. The related Controlling Action Identifiers available in the dropdown are listed below. When the admin is configuring Document Tracking Templates, they can flag which documents are required. This will cause the red icon to display next to the applicable Index Name on the Document Tracking Templates.</p> |

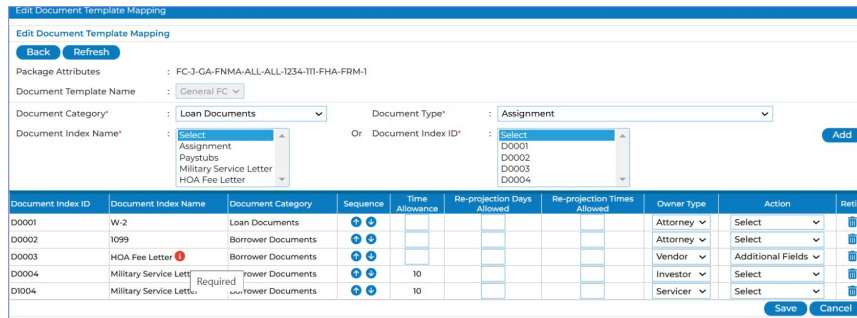
Controlling Action Identifiers for Claims Subtype


- Foreclosure
- DIL
- Single Family Loan Sale
- Indian Lands
- Hawaiian Homelands
- Supplemental
- 1st Chance
- 2nd Chance
- Pre-Foreclosure Sale
- Special Forbearance
- Loan Modification
- FHA-HAMP Loan Modification
- National Emergency Partial Claim
- Natural Disaster Partial Claim
- HAMP Partial Claim
- National Emergency Partial Claim with Mod
- Natural Disaster Partial Claim with Mod
- COVID Partial Claim with Mod
- COVID Partial Claim with Payment Supplement
- Foreclosure Sale
- 3rd Party Sale
- Settled at FCL
- Settled at DIL

Claims User

On a Claims Referral, the applicable Document Tracking Template will be triggered when the Claims subtype is present and one of the above Controlling Action Identifiers has been selected.

A new indicator red  icon will display next to the **Document Index Name** and hovering over the icon will display the word **Required** in the **Document Management Creator** screen. When the user is reviewing a Document Tracking Template at referral level, the icon indicates that the user should upload the required documents.



| Document Index ID | Document Index Name | Document Category | Sequence | Time Allowance | Re-projection Days Allowed | Re-projection Times Allowed | Owner Type | Action | Retire |
|-------------------|--|--------------------|----------|----------------|----------------------------|-----------------------------|------------|-------------------|--------|
| D0001 | W-2 | Loan Documents | 1 | | | | Attorney | Select | |
| D0002 | 1099 | Borrower Documents | 1 | | | | Attorney | Select | |
| D0003 | HOA Fee Letter  | Borrower Documents | 1 | | | | Vendor | Additional Fields | |
| D0004 | Military Service Letter | Tower Documents | 1 | 10 | | | Investor | Select | |
| D1004 | Military Service Letter | Tower Documents | 1 | 10 | | | Service | Select | |

Testing Considerations

Triggering Document Tracking Templates by Claim SubType Testing Considerations

Positive Testing

(this is available for clients that have the DARA Claims Integration)

1. Configure Document Tracking Template with Controlling Action equals Claim SubType and Controlling Action Typing is one of the active claim subtype. Map documents to the template.
2. Create a DARA Claims Referral to activate the Claims Module and the Claims Workstation. The Claims Workstation will return a successful response with the claim subtype.
3. This will trigger the Document Template with the matching Claim SubType as a Controlling Action Type to apply to the claim at loan level in the Claims Module.

Negative Testing

1. Configure Document Tracking Template with Controlling Action equals Claim SubType and Controlling Action Typing is one of the active claim subtype. Map documents to the template.
2. Create a DARA Claims Referral to activate the Claims Module and the Claims Workstation. The Claims Workstation will return a successful response with the claim subtype.
3. The Document Template with the matching Claim SubType as a Controlling Action Type to will not apply to the claim at loan level in the Claims Module.

Required Documents Identified with red icon

Testing Considerations

Positive Testing

(available to all clients)

1. Select a document mapped within a Document Tracking Template. Select Action drop down. Select Additional Fields. In the Additional Fields popup, set Conditions to Required and in the Special Request field enter Required. Save the information.
2. That specific Document Index Name in the template will now display a red informational icon. Save the template.
3. When the Document Tracking Template triggers at loan level, the red information icon will display next to the Document Index Name.

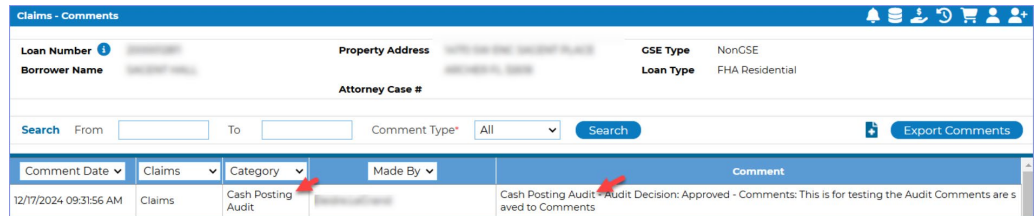
| | |
|-------------------------------|--|
| | <p>Negative Testing</p> <ol style="list-style-type: none"> 1. Follow the directions listed in the Positive Testing. If the red informational icon does not display after saving the Additional Fields popup, then this is a fail. 2. Note: The required document identification is informational only and will not prevent a workflow process from moving forward. |
| Feature 521862 | Miscellaneous Claims Items |
| Description | <p>This feature resolves the following Claims items.</p> <ul style="list-style-type: none"> – On the Worklist Queue screen, all of the specific queues, such as Queue Type, Queue Status, Module Type, Module Sub-Type, Owner Type, and State, drop-down values now work correctly for filtering the queue. – The Work Queue button on the Worklist Queue screen now navigates to user to the applicable screen. – On the Worklist Queue screen, the message "No Records in Queue" was displaying when the user clicked the Next Work Item button. This has been corrected so that the next work item will display when the user clicks that button. |
| Testing Considerations | <p>Testing Considerations</p> <p>No configuration needed</p> <ol style="list-style-type: none"> 1. Audit Queue Filter Dropdown <ul style="list-style-type: none"> ○ Verify that each dropdown option is functional and filters the queue correctly. ○ Test with various combinations of filters to ensure they work together seamlessly. ○ Check for any performance issues when applying multiple filters. 2. Next Work Item in the Worklist Queue <ul style="list-style-type: none"> ○ Ensure the "Next Work Item" button navigates to the next loan and locks the user as the auditor. ○ Verify that clicking the loan number does not assign the user to the loan from user's audit queue. 3. Work Queue Button Navigation <ul style="list-style-type: none"> ○ Verify that clicking the work queue button navigates to the correct DCP audit page. ○ Check that the Approval button is present on the DCP audit page. ○ Ensure that items approved via audit are removed from the queue promptly. ○ Verify that the queue updates correctly and does not display approved items. |

Feature 479859

Modify Audit Queue for Default Cash Posting

This feature provides the following enhancements to the Default Cash Posting screen.

- Users can view the Default cash posting comments from the audit queue on the comments section of the Claim Referral. When a user enters comments in the Audit Approval pop-up, those comments will be saved and can be viewed on the Comments link under the claim Referral. Users can filter the comments; select Claims as the Module and select Cash Posting Audit as the Category. The comments display as shown below.



- Users assigned as both Default Cash Posting Poster and Auditor will no longer be able to approve their own posting instructions.

Description

| Permission Level | Description |
|--|---|
| read/write permissions for Default Cash Posting | When the user saves and approves the Cash Posting Instructions for a claim and that claim is flagged for Default Cash Posting Audit, then it will go into the Default Cash Posting Audit Queue based on the user threshold. |
| read/write permissions for Default Cash Posting and Default Cash Posting Auditor with extended permissions | When the user saves and approves the Cash Posting Instructions for a claim and that claim is flagged for Default Cash Posting Audit, then the user doesn't have the ability to audit those same posting instructions. |
| Default Cash Posting Audit Approver | The user will require extended permissions to access the Default Cash Posting Audit Queue. |

- The system now supports audit functionality by user. The system will now populate the audit queue based on the number of Claims Approval Postings for each individual user, rather than on the number of Claims Referrals for the entire Claims department. This provides a more accurate depiction of the number of loans being audited per user.

Testing Considerations

Testing Considerations

Display of Comments

- Verify that default cash posting comments from the audit queue are now visible in the comments section.
- Ensure that comments made in the Default Cash Posting (DCP) screen appear under the Comments Claim Category in the Comments Page.
- Confirm that all comments in a pop-up in TEMPO are correctly transferred to the comment screen under Claims > Claims category.

Audit Functionality

- Test the audit functionality to ensure it calculates based on the number of default cash posting approvals by user.
- Confirm that if a Default Cash Posting user is setup as a User and Loan Type in their Audit Parameters that the User Threshold will hold true over the loan type threshold.

Approval Restrictions

- Verify if a user tries to approve their own posting instructions and confirm that the system prevents this action.
- Ensure that users who are both DCP Poster and Auditor are restricted from approving their own posting instructions.

Specifications

Testing Setup

- User Setup:
 - This will require three different accounts to fully test all scenarios
 - Default Cash Posting User - This user should not require extended user permissions for Default Cash Posting module
 - Default Cash Posting Auditor - This user will need the Default Cash Posting Audit Queue assign to their account.
 - Default Cash Posting User/Auditor - This user will need both set-up to test to ensure that a user cannot audit their own postings.
- Configuration Requirements:
 1. Audit Parameter Creator
 - a. New User Setup
 1. The user will need to set-up under the Parameter Builder under Audit Parameter Creator
 2. For a new user that needs to be set-up, then click "Create a New Audit Preference". The "Add Audit Preference" screen will pop-up and the following fields will need to be selected.
 - Audit Category (required) > Select "Default Cash Posting"
 - Audit Parameter (required) > Select "User" (User is a new option for Default Cash Posting)
 - User (required) > Select applicable user

b. Existing User Setup

1. Click "Edit Audit Preferences" this will allow editing any current user setup
2. Select applicable line with the user you would like to update preferences on for the current threshold percentage.
3. Enter the percentage; the higher the percentage the higher the likeliness for the approving cash posting user to have their task to be moved into the Default Cash Posting queue to be audited.

2. Queue Creator

i. Default Cash Posting Queue Setup

1. Search the User Queue
2. Click the "Create/Edit" icon and bring up the Queue Assignment Criteria for the user
3. Ensure that the user has "Default Cash Posting" highlighted under their Audit Type
 - ***This change will take overnight***

Testing Scenarios

1. **Default Cash Posting Comments**

- o As a Default Cash Posting Auditor, approve or reject a default cash posting audit provided in the DCP Queue and confirm that default cash posting comments write back to the Comment screen.
 - i. Go to Comments and confirm that the approval or rejection displays under the Claims module and the Cash Posting Audit category.
 - ii. Confirm the format of the comment:
 - "Cash Posting Audit - Audit Decision: Approved - Comments: <user comments>"
 - "Cash Posting Audit - Audit Decision: Rejected - Comments: <user comments>"

1. **DCP - Audit Queue Percentage Logic Change**

- o Confirm that the calculation denominator is based on the number of Claims Default Cash Postings approved rather than Claims Referrals.
 - i. Test the threshold set under configuration for the DCP user approving posts,
 - EX: DCP User Threshold% = 100% then all DCP postings that are approved will be sent to the Default Cash Posting Audit Queue to be reviewed by a Default Cash Posting Auditor.
 - EX: DCP User Threshold% = 50% then 1 out of 2 posting that is approved will be sent to the Default Cash Posting Audit Queue to be reviewed.

2. **Auditing by User**

- Verify if a user tries to approve their own posting instructions and confirm that the system prevents this action.
- 1. Verify that the As a Default Cash Posting User, go to a loan that requires a Default Cash Posting Instructions that needs to be reviewed.
 - Once reviewed, click the "Save" button, then click "Approve Posting Instructions"
 - The button will change to a greyed out "Audit Approve" to prohibit the user from approving their own posting
- Ensure that users who are both DCP Poster and Auditor are restricted from approving their own posting instructions.
- a. Verify that the As a Default Cash Posting User/Auditor, go to a loan that requires a Default Cash Posting Instructions that needs to be reviewed.
 - Once reviewed, click the "Save" button, then click "Approve Posting Instructions"
 - The button will change to a greyed out "Audit Approve" to prohibit the user from approving their own posting
- b. Verify as a different Default Cash Poster Auditor, go to the same loan and verify that you can audit the default cash posting instructions.
 - Click "Audit Approve" button and a pop-up should display where the user can enter comments
 - Enter comments and then approve the default cash posting instructions
 - Check the Comments screen to verify if that comments display as entered.